Lifecycle Management

Initiative

Document a format for establishing a move to a highly **standardized statewide desktop environment** in order to initiate a "Lifecycle" Program to replace and cascade 1/5 of the desktops each year with a centralized focus of procurement and vendor relationship management functions managing the replacement cycles. Additionally, a 3-7 year cycle on all servers may follow the same process. Lifecycle program improves State purchasing power and license management. It enhances information sharing and staff productivity via common and current PC tools. Promote basic IT service provisioning as a "utility" across the State. Utilize expertise in vendor management and supplier scorecards to gain value from purchases.

Team Mission Statement

The Desktop Lifecycle Management transition committee will offer input and feedback for establishing and implementing a statewide standardized desktop environment and lifecycle (Acquisition, Deployment, Management & Support, Retirement) program; and defining a cycle for acquisition and retirement of servers. The State of Iowa and its customers will benefit from a standardized approach to desktop lifecycle. A lifecycle program will improve State purchasing power and license management.

Lifecycle Management Model

The Desktop Lifecycle Standards Team focused specifically on the Technology component. There are four elements to that approach and each element will be explored in more detail. When we consider TCO (Total Cost of Ownership), it is imperative that we look at Acquisition, Deployment, Management & Support and Retirement/Disposal. They could also be labeled:

- Pre-purchase Needs/Assessment and Planning (Acquisition)
- Installation/Retrofitting/Setup/Configuration/Validation (Deployment)
- Warranty/Service Level Agreements/Maintenance Contracts (Support)
- End-of-Life Usage/Phase out/Replacement (Retirement/Disposal)

The acquisition element requires a number of steps beginning with an accurate inventory of current desktop devices. It requires an inventory of current practices of each department. This should include the configurations being utilized by job or function. Once that information is gathered and reviewed a set of standard configurations will be established. In order to minimize cost only those configurations may be ordered. A team will be created that will select potential vendors that are willing to work with the State of Iowa to reduce the cost of ownership for the selected configurations. The selected vendors will compete and present their best price. The alternate approach to this process is the use of on line order through dedicated portal with committed low price without any committed volume.

The deployment will, likewise, have a number of steps. A plan will need to be developed that considers the most cost effective way of deploying the devices to the desk. For example, should the vendor be required to store a number of configured devices so that delivery can be achieved within days of the order? Should the devices be kept at state facilities and installed by state personnel? Adequate training of personnel, vendor or state, must be provided to ensure trouble free installations. Once the device is installed it should be set up and configured appropriately, that is, meeting expectations of the user. The user-indicating acceptance of the device should initial a sign off sheet. This allows for a tracking mechanism completing the installation. The information should then be entered into a database for inventory purposes. It will minimize the need to re-inventory the assets frequently. It will minimize cost and allow for more accurate information concerning the desktop. It will also allow for an aging list when new devices are considered. The use of software to track inventory should be applied.

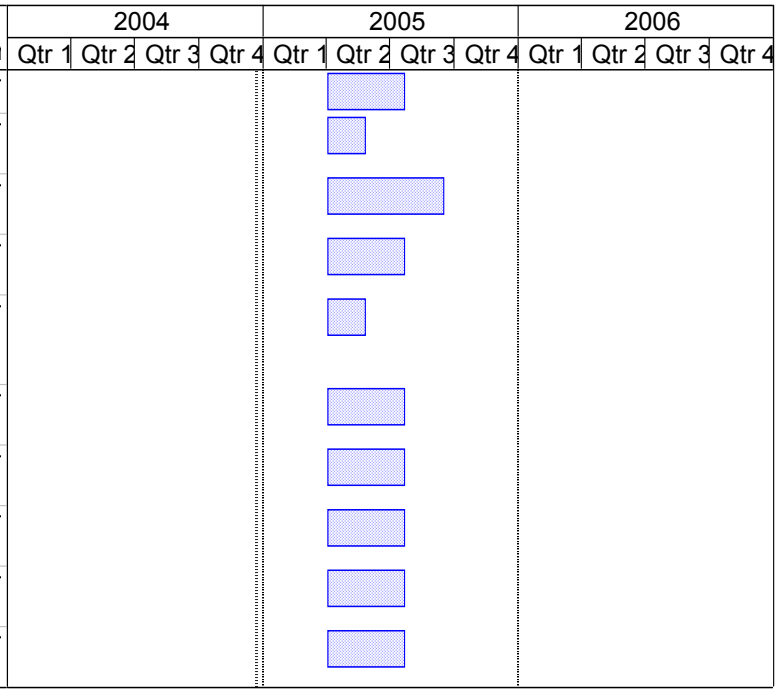
The support element encompasses a number of steps as well. Service agreements need to be developed. Prior information, such as department requirements, standard warranty, will need to be considered. Input from department heads will be required to determine service levels of agreement. If a lifecycle of three years is decided, warranty may cover the entire timeframe. That may result in significant cost savings. Response times for support will need to be negotiated as well as repair practices. For example, at what timeframe will a device be replaced? A committed repair time will reduce excessive downtime. A “hot spare” may be the solution to extended outages. The “hot spare” can immediately replace the down device while the technician repairs the device off site. This procedure may reduce downtime and increase productivity. Location of spare parts is also critical to minimizing downtime. If all spare parts are kept off site there is an element of travel to consider. Some level of on-site spares should be negotiated. Escalation procedures need to be identified. Change management process should be developed. Tools that automate contact information including: locations, name, phone number and service level is critical. It shortens telephone time for the call center and supplies necessary information to the technician, once again reducing repair time. It also allows for useful reports that can be utilized during vendor evaluation. Scorecards are important

to both the user and the vendor. It creates a more positive relationship by providing feedback to the vendor. Adjustments may be made to agreements to cover identified gaps in service through the evaluation process. It may provide background should the state find it necessary to cancel contracts without penalty.

Finally, the process for retirement/disposal of equipment needs to be developed. End of life procedures may include re-distribution of equipment. Devices may still be useful to some job functions of a less critical nature. Some cost savings may be recognized through the re-distribution of devices. Once it is decided to dispose of a product a charitable contribution may be considered, if allowed by code. A third party may be contracted to dispose of the devices. Part of the process must include removal of all information from all storage components within the device. This ensures confidentiality and security to sensitive information. The third party should supply certificates indicating proper disposal has occurred and the certificates presented to the state. Penalties to the third party should be identified for not disposing of devices as agreed to by contract.

Activity Level Project Timeline

ID	Task Name	Duratio
1	Define desktop standard	4 mor
2	Define Acquisition Proce	2 mor
3	Identify current equipme	6 mor
4	Identify replacement lifec (Time period) M	4 mor
5	Define deployment proce (delivery, setup, …) M	2 mor
6	Create license managem policy H	4 mor
7	Develop Vendor evaluati criteria M	4 mor
8	Define support structure	4 mor
9	Define support function H	4 mor
10	Define disposal plan M	4 mor



Description of Activities

1. *Identify Current Equipment*

Description

Types of hardware and configurations
Determine asset management
Review of inventories

Risk

Low

Considerations

Administrative: Common repository. Workload. Communication. Staff augmentation cost.
Dependencies: Network

Expected Outcome:	Accurate inventory can effectively reduce cost.
Timeframe:	3 –6 months
Cost:	50K – 100K (240-400 staff hours)

2. *Identify Replacement Lifecycle (Time Period) Implications*

Description

Review lease purchase vs. buying (costs, contracts)
Scheduling acquisition
Inventory current agency practices
Periodic review of standards (desktop & server)
Determine mechanism to handle exceptions
Mechanism for exceptions

Risk

Medium

Considerations

Administrative:
Funding streams. Availability of personnel. Timing – fiscal year considerations.

Expected Outcome:	Improved budget planning.
Timeframe:	2 – 4 months
Cost:	20K (500-800 staff hours)

3. Define Acquisition Process

Description

Review lease purchase vs. buying (costs, contracts)
Vendor acquisition list
Determine PC build/roles/ business need (configuration)
Request free options, "hot spare" and training from vendors
Inventory current agency practices
Vendor scorecards
Periodic review of standards (desktop & server)
Create license mgmt policy

Risk

High

Considerations

Legislative: Potential code issues. (Seek waiver/process falls within code)
Administrative: Prioritization of staff involved in project. ADA 508.
Dependencies on other groups: Funding initiative.

Expected Outcome:	A planned process will simplify ordering from standards list.
Timeframe:	1 – 2 months
Cost:	15K – 30K (300-500mstaff hours)

4. Define Deployment process

Description

Determine security requirements
Determine agency delivery preferences
Determine installation process
Determine vendor responsibilities vs. agencies for deployment
Scheduling deployment plan
Determine mechanism to handle exceptions

Risk

High

Considerations

Legislative: IRS regulations, security. Identify issues and avoid.
Cultural: Buy in from users. Configuration differences.
Dependencies on other groups: Network initiative.

Expected Outcome:	Simplify the process by creating standards.
Timeframe:	1 – 2 months
Cost:	10K – 30K (240-320 staff hours)

5. Define license management policy

Description

Identify replacement
Inventory current agency practices
Periodic review of standards (desktop & server)
Identify current equipment
Determine agency delivery preferences
Determine installation process
Determine asset management
Review of inventories
Determine security requirements

Risk

Medium

Considerations

Legislative: TSB vendors.
Administrative: Forced upgrades. Potential mandate or management support for implementation.

Expected Outcome:	Reduction in cost by eliminating unnecessary products.
Timeframe:	2 – 4 months
Cost:	10K – 30K (350-500 staff hours)

6. Define Vendor evaluation criteria

Description

Determine agency delivery preferences
Determine installation process
Determine vendor responsibilities including quality of service, SLA's, tools and maintenance contracts
Determine security requirements
Industry benchmarks

Risk

Medium

Considerations

Administrative: Consider current ITQ.
Dependencies on other groups: Procurement and legal.

Expected Outcome:	Improved vendor relationship through regular communications.
Timeframe:	1 – 3 months
Cost:	50K – 100K (100-250 staff hours)

7. Define Desktop Standard – Driven by Business Needs

Description

Types of hardware and configuration
Determine security requirements
Define who will administer
Inventory current agency practices
Identify current equipment
Develop policy of non-state owned equipment (PDAs, PC, etc.)
Change management/control

Risk

High

Considerations

Administrative: Organizational/Business Program needs. Current technology limitations. (Legacy vs. current) Technology driven requirements. (ADA)
Dependencies on other groups: Security. Architecture initiative.

Expected Outcome:	Reduced cost through single point of contact and standards.
Timeframe:	2 – 4 months
Cost:	25K – 50K (300-500 staff hours)

8. Define Support Structure

Description

SEE CONSIDERATIONS

Risk

Medium

Considerations

Dependencies on other groups: Ensure this is being considered by another group or team

Expected Outcome:	Defines where to go for services. Takes away the guesswork.
Timeframe:	2 – 4 months
Cost:	0

9. Define Support Function (What)

Description

Determine asset management
Determine vendor responsibilities vs. agencies for deployment
IT training for staff

Risk

High

Considerations

Administrative: Business needs. Geography. Funding, cost allocations.
Dependencies on other groups: Initiatives 2, 5, 9.

Expected Outcome: Clearly defined service delivery.

Timeframe: 1 – 4 months

Cost: 15K – 50K (400-600 staff hours)

10. Define Retirement / Disposal Plan

Description

Review current procedures
Security requirements
Eliminate costs at end of life/return issues
Define service level agreements
ISO input to policy
Determine mechanism to handle exceptions

Risk

Medium

Considerations

Legislative: Investigate codes.
Administrative: Current policies
Dependencies on other groups: Security

Expected Outcome: Potential cost savings through re-distribution or planned obsolescence.

Timeframe: 1 – 4 months

Cost: 10K – 25K (150-250 staff hours)

Cultural Impacts:

- Potential lack of input from user community.
- Potential job delays due to assignment to workshops.
- Configuration differences from current configurations.
- Diverse SW requirements for agencies.
- No non-state approved SW installed on desktop devices.
- Control and trust of vendors.
- Current agency practices versus new requirements.